2017-2018 Perkins Local Plan Instructions

NOTE: The IndyGrants system has a time limit of 1 hour per federal requirements; because of this, you need to save your work frequently. The system does not have the ability to recover your lost work.

Step 1: Create a 2016-2018 Local Plan

There are two ways to create a Local Plan for 2017-2018. The first is to create a new plan in IndyGrants. The second it to Rollover your 2015-2016 grant, which means make a copy of your 2016-2017 grant and then make your modifications for 2017-2018. You can choose either option, but if you are a new or newer Director, we suggest you start with a fresh slate and make the Local Plan your own.

Creating a New Local Plan

1. Log-in to Indygrants.com/login.
2. Select "Grants" from the menu bar on the right of the page.
3. In the upper left corner, you will see the "New Grant" button. Click on it.
4. A dialog box will appear with two fields:
    a. The first field is grant year. Select "2017-2018" from the drop-down list.
    b. The second field is location. Almost all of you will only have one location so just select it. If you have more than one location, select the location you want to work on.
    c. Click the "Create Grant" button.
5. This will create a new Local Plan for 2017-2018, which will automatically open.
6. Scroll down to the Creating a 2017-2018 Grant section of these instructions to finish.

Rollover the Previous Plan

1. Log-in to Indygrants.com/login.
2. Select "Grants" from the menu bar on the right of the page.
3. Locate your 2015-2016 plan and hover the cursor over it. Right-click on it.
4. A menu will appear. Locate the "Rollover Grant" option and click on it.
5. A dialog box will appear. Select "2017-2018" from the drop-down list and click the "Create Grant" button.
6. This will create your new plan for 2017-2018, which will automatically open. Scroll down to the Finish Creating a 2017-2018 Plan section of these instructions.

Finish Creating a New Local Plan

7. In the upper middle of the screen you will see a section titled "General Grant Properties." Complete this section at this time.
    a. For grant title, at the very least put your Area District number.
    b. The rest of the information will be your information as the Area CTE Director.
8. Finally, in the upper right, locate the "Save" button and click it. This will save your new plan and take you back to the list of all your grants. If you do not click "Save," your plan will not be saved and any work will be lost.

Step 2: Creating/Editing Program Activities

The major part of a Local Plan is outlining the program activities your district will be doing during the grant year. In the past, the regulations have allowed districts to choose to organize their Program Activities by activity or by budget categories. Per this year's guidance from the USDE, all Program Activities for 2017-2018 need to be organized by activity. Local Plans organized by budget categories cannot be approved and would have to be redone if submitted this way.

Creating a New Program Activity

1. Open your 2017-2018 plan. In the middle of the screen, you will see the two tabs (one for Program Activities, and the other for Improvement Plans).
2. Below those two tabs, you will see a green bar. At the right end of the green bar, locate the plus sign within a grey circle. Click on it. This creates a new activity line below, which will be whited out since you have not yet entered any information.
3. Complete the information on the General tab.
    a. Program Activity number: In the past, this had been defined by each district. In order to have more consistency across all the plans, we will use a defined system. Each number will start with the initial year of the activity followed by a letter in alphabetic order. So, for example, for an activity that was started last year and was your second activity you would put 1516-B. For new activities, you would number them 1617-A, 1617-B, and so on. Please remember, a specific activity should be done for a maximum of 3 years. Specific activities that began before the 2014-2015 grant period should be modified or eliminated in your 2017-2018 Local Plan.
    b. Activity Title: This should be short and should identify the main purpose of the activity. Examples would be titles such as Non-Traditional, Program Improvement, Professional Development, Culinary Arts, etc.
    c. Activity Type: There are four types of activities, which are:
        i. New Activity – If this is a new activity, select this option
        ii. Continuation from Previous Year – If you are continuing an activity from the previous year, select this option.
        iii. Eliminated – If you are discontinuing an activity done during the previous year, then select this option. Note that if you created a new plan, the activities from last year won't appear so you won't have this type of activity.
        iv. Funded from Non-Perkins Sources – If you want an activity to be considered as part of your local plan even if it is funded with non-Perkins funds, you will use this option. A reason you might include such activities is if you are missing a Required Use but would be meeting it with an activity that is locally funded, then you would use this option.
    d. Activity Description: This is a summary description of the activity you are planning and a brief explanation of why. The reader should get be able to get a broad understanding of what you will be doing and how it will impact your CTE programs. Please be succinct. Aim for brief but specific.
4. Complete the information on the Outcomes/Methods tab:

   a. Expected Outcomes – List 2 to 4 outcomes that you expect from this activity. These outcomes could be improved indicator results or other metrics you track at the local level. This should be bullets or phrases rather than lengthy narrative.
   b. Evaluation Methods – Describe how you will determine at the end of the grant period if this activity is successful (how you'll know you met the goal/metric) and what action you might need to take if the activity was not successful. This should be no more then 2-3 sentences.
   c. Explain how the activity will assist in the improvement of core indicators that were not met in 2014-2015.. If it does not impact those indicators, provide a reason why you are doing an activity that does not address failed indicators. This should be no more then 2-3 sentences.
5. Complete the two Indicator tabs – For each indicator that would be impacted by the activity, describe how the indicator would be impacted. For example, if your activity is for academic integration, it will impact 1S1 and 2S1 so you could simply say you should see improvement in those indicators because of the extra focus. Note the activity could also impact Graduation and Completion indicators, so you would want to also describe how those indicators would be impacted.
6. Complete the Budget tab –
   a. Personnel – If you will use funds to cover all or part of a salary for this activity, then you would show the dollar amount. For the notes, you would list the percentage of FTEs being covered and the position titles (for example 1.5 FTE for 3 Instructional Aides).
   b. Fringe Benefits – If you have an amount in Personnel, you may have an amount in Fringe Benefits. The note should explain what benefits are being paid for with Perkins.
   c. Travel – The amount budgeted to cover travel expenses. The notes need to list the type of expense (mileage, hotel, airfare, rental car, etc.), the rate that is being used (must be the state rate or lower), and a few examples of the events being attended (IACTED Meetings, PD Conference, etc.).
      i. For 2017-2018, the state rates (or lower) for per diem and mileage must be used. Note that the state mileage rate can change during the grant year. If this change occurs, you will receive notification and will need to adjust your reimbursements paid with Perkins funds.
   d. Services – Services covers everything from formal contracts to stipends and conference registrations. Because this is a broad category, please include all the services you plan to purchase with Perkins funds.
   e. Equipment – This item is for any item that has a value of $500 or more or a useful life of more than a year. Any item that meets this definition must also be inventoried. The notes need to identify the equipment you plan to purchase, but you do not have to have the finite details. For example, list 3 welders, 1 3-D printer, or 25 desktop computers. You don't need to be so specific as to list specific make and model, for example, in this plan.
   f. Materials – Tangible items that are not considered equipment. Note that the materials must be used for the instruction of CTE, but cannot be used for items

for students. Also, items that are for administration of CTE are not allowed here. Notes should specify the types of materials that would be purchased but do not need to be so specific as to materials specifications or brands.
    g. Other – The Other category has been eliminated per USDE guidance. If you are not sure of where something should be reported, please contact Eric (eogle@doe.in.gov or (317) 232-9167).
7. Complete the Usages tab:
    a. Select the all the Required Uses that are met by the activity. All of your activities together must cover all of the required uses.
    b. Select all the Permissive Uses that are met by the activity.
8. Select OK and then Save. It is suggested that you save after you complete each activity so you do not lose any work.
9. Repeat steps 1-8 until you have all your activities entered and your entire allocation used.

Step 3: Indicators and Improvement Plans

As part of your Local Plan, you are required to describe what your district is doing to improve core indicators that you failed.

Completing Improvement Plans for Failed Indicators

1. Go to the Indicators/Improvement Plans tab
2. For any indicator that say "Plan Needed," you will need to complete an Improvement Plan.
3. To start, click on one of the needed indicators. A window will open for that indicator.
4. Complete the information on the General tab.
    a. General Strategies planned to improve performance – brief description of what you plan to do to improve the indicator. Please be succinct and specific. No more then 4-5 sentences. You could tie this back to activities already addressed; just refer to the activity number and how it will help improve the indicator.
    b. Comments or Context on Actual Performance – Provide insight into your actual performance such as improved by 3% but still did not pass, or briefly explain issues with reporting data.
5. Complete Sub-Populations tab.
    a. In INTERS Reports locate the report for each Indicator you did not pass.
    b. On the report, determine which of the subpopulations is below your LAUL. They will be the one you indicate on your Local Plan.
    c. On the subpopulation tab, complete the request information
        i. Sub-population – Click each sub-population that was below your AUL.
        ii. Contextual Factors – Describe factors that may explain why a sub-population was failed. No more than 1 or 2 sentences would be needed.
6. Complete Action Steps Tab
    a. Complete the fields.
        i. Steps to improve performance – list the step you will be taking to implement your plan. This should just be a quick list of steps that the reviewer can easily follow.

ii. Person Responsible – Who are the people who will be completing and monitoring the steps taken? List their job titles.
iii. How progress will be documented – Describe how you will show progress on this plan. No more then 1-2 sentences are needed.
iv. Resources – List the resources that will be used. Resources can be anything from time to materials to money. Do not leave blank or say no resources will be used.
v. Implementation Timeline – State when you plan to start, how often you will have status checks, and when you plan to have the action completed. For example, "Will start plan immediately with biweekly status checks, and have action completed by December 2016"

7. Complete the Additional Information Tab
    i. Stakeholders Involved – Are there any stakeholders outside of the CTE program that will be involved? List who they are. If none, please explain why.
    ii. Process – Describe the process you will use to evaluate the success of the plan. Will there be metrics that are checked monthly? Weekly?
    iii. Data Sources – List the data sources that will be used to evaluate the plan. INTERS would always be listed. Are there other date sources you could use that are real time?
8. Select Ok and then Save. It is suggested that you save after you complete the plan for each failed indicator so you do not lose any work.
9. Repeat steps 1-8 until you have all failed indicators have been completed.

Step 4: Upload Required Documents

In order to finalize a Local Plan, we must have a Transmittal Page and the Consortium Signatures pages. These will be uploaded as PDF documents into your Local Plan.

1. Chose the 2017-2018 plan and right click to edit.
2. In the right-hand corner you will see the print button, click that. This will bring up the Print options. Please print the transmittal page, and then print the consortium page. Click Save and this will take you back to the grants page.
3. Once these documents have been completed, you will need to scan them back in to your drive as PDF documents.
4. Click on the 2017-2018 grant and right click;, this will bring up the options for you to choose.
5. Click on the "Upload Signature Page", give the file a name (signature page or transmittal page), the click browse and select the file, then click upload.
6. If you would like to see what has been uploaded, go to the 2017-2018 plan and right click and then choose "view upload"

Step 5: Final Check and Submission

Before submitting your Local Plan, please review all of it against these instructions and make sure nothing is missing. Be sure the plan adequately shows how you will use Perkins funds and there are no non-allowable expenses. This will reduce the likelihood of your plan being returned.

1. Review each activity for completeness.
    a. Check that each tab is complete
    b. Review budget. Does every item that has a dollar amount also have the appropriate notes? Are all the expenses allowable?
    c. Review Required Uses. Are you meeting all the Required Uses?
2. Review each failed indicator.
    a. Has each tab been completed?
    b. Do you have your subpopulations listed?
    c. Do you have action steps?
3. Check overall budget. This is located directly below the list of activities.
    a. Is the activity total correct?
    b. Are you budgeting for Administrative expenses? Is that amount 5% or less of your total allocation?
        i. Administration is for administration of the grant rather than for general administrative expenses.
    c. Check Proposed Total against Allocation. Is there a difference? If yes, adjust the budgets in the activities so there is no difference.
4. Save grant one last time.
5. Submit your 2017-2018 Local Plan
    a. On the main page that lists all your grants, hover the cursor over your 2017-2018 Local Plan and right-click on it.
    b. A menu will appear. Select “Submit Grant” from that menu.
    c. Check the status of your 2017-2018 Local Plan. If it was successfully submitted the status will change to orange and say “Initial Review”.

If you have any questions about the content or what is expected within your Local Plan, please contact Eric Ogle, Perkins Administrator at eogle@doe.in.gov or by phone at (317) 232-9167.

Technical questions, such as not being able to access your grants, should be addressed to the DWD staff through their support tool at http://support.scherb.com/.